DOCUMENT RESUME

ED 270 127 IR 051 542

TITLE	OMS Annual Report, 1985.
INSTITUTION	Association of Research Libraries, Washington, D.C. Office of Management Studies.
PUB DATE	85
NOTE	33p.; For the 1983 annual report, see ED 243 482.
AVAILABLE FROM	Office of Management Studies, Association of Research Libraries, 1527 New Hampshire Ave., NW, Washington, DC 20036 (free while the supply lasts).
PUB TYPE	Reports - Descriptive (141)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	*Academic Libraries; Annual Reports; *Information Dissemination; Information Processing; Inservice Education; Library Acquisition; *Library Administration; *Library Associations; Library Collections; Library Services; *Management Development; Program Implementation; *Research Libraries; Staff Development
IDENTIFIERS	*Association of Research Libraries

ABSTRACT

This report describes the following 1985 Office of Management Studies (OMS) programs and services: (1) the Academic Library Program (ALP), which includes the Organizational Screening Program, the Collection Analysis Project (CAP), the Preservation Planning Program (PPP), the Public Services Study (PSS), the Management Review and Analysis Program (MRAP), the Academic Library Development Program (ALDP), and the Planning Program for Small Academic Libraries (PPSAL); (2) the Systems and Procedures Exchange Center, including the Information Exchange and Publications Program, the Automation Inventory of Research Libraries, and electronic mail applications; (3) the Organizational Training and Staff Development Program, which provided various management skills institutes and special focus workshops; (4) Applied Research and Development, which provided such services for members of the Association of Research Libraries (ARL) as Preservation Planning Studies, the Collaborative Research/Writring Program, the North American Collections Inventory Project, and public services research and other projects. Also described are highlights of OMS activities in 1985 and OMS priorities for 1986. Appendices include a bibliography of OMS 1985 publications, a brief financial statement, a directory of OMS advisory committees, a list of OMS consultant trainees and project assignments, and a schedule of services for 1985-86. (THC)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

U.S. DEPARTMENT OF EDUCATION
OERI
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

☒ This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official position or policy.

"PERMISSION TO REPRODUCE THIS MATERIAL HAS BEEN GRANTED BY

Maxine Sitts

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Annual Report

1985

Duane E. Webster, Deputy Executive Director, ARL;
Director, OMS
Jeffrey J. Gardner, Associate
Susan R. Jurow, Training Program Specialist
Jutta Reed-Scott, Collection Development Specialist
Maxine K. Sitts, Information Services Specialist

Office of Management Studies
Association of Research Libraries
1527 New Hampshire Avenue, N.W.
Washington, D.C. 20036
(202) 232-8656

ISSN 0278-7946

Table of Contents

Introduction 1

Highlights of OMS Activities in 1985 2

The Academic Library Program—Background 3
Academic Library Program Self-Studies, 1985 4
TABLE 1. Academic Library Program Self-Studies, 1985

The Systems and Procedures Exchange Center—Background 6
Information Exchange and Publications Program, 1985 7
Automation Inventory
Electronic Mail
TABLE 2. Systems and Procedure Exchange Center Activities, 1985
TABLE 3. Systems and Procedures Exchange Center Surveys, 1985

Training and Staff Development Program—Background 10
Organizational Training and Staff Development, 1985 11
New Analytical Skills Institute
TABLE 4. Management Skills Institutes, 1985
TABLE 5. Special Focus Institutes, Workshops, and Presentations, 1985

Applied Research and Development, 1985 14
Preservation Planning Studies
Collaborative Research/Writing Program
TABLE 6. Collaborative Research/Writing Program Participants and Topics, 1985
Measuring Book Use
Institute on Research Libraries for Library School Faculty
North American Collections Inventory Project
NCIP Training
Canadian Collection Inventories Plan
OMS NCIP Materials
TABLE 7. North American Collections Inventory Project Consultants

OMS Priorities for 1986 18
Academic Library Program
Information Exchange and Publications Program
Organizational Training and Staff Development
Research and Development
Other Priorities

Appendices

A. Staff and Program Publications, 1985 20

B. Advisory Committees 22

C. Consultant Trainees and Project Assignments 24

D. OMS Financial Statement, 1985 (unaudited) 28

E. Schedule of Services, 1985-86 29

Introduction

A recent study of executives in a variety of successful enterprises concludes that leaders are not born. They are developed—emerging when organizations face new problems and complexities that cannot be solved by unguided evolution. These individuals assume responsibilities for reshaping organizational practices to make them more adaptive to reflect environmental changes. They direct organizational changes that build confidence and empower their staff to seeek new ways of doing things. They overcome resistance to change by creating visions of the future that evoke confidence in and mastery of new organizational practices. (Bennis, Warren and Burt Nanus. *Leaders: The Strategies for Taking Charge*. New York: Harper and Row, 1985.)

The ARL Office of Management Studies has sought since its inception to encourage such leadership in research library management. Through training in management concepts and techniques and provision of timely information on changes in current operating practices, the Office has supported leadership that is open to new ideas, adaptable to changing circumstances, and active in influencing evolving structures and capabilities. At the core of this OMS philosophy is commitment to the continuing development both of individuals and of the library organizations comprising the Association of Research Libraries.

With this commitment to change and improvement, the Office continues to review and strengthen its resources and services. In the last year, the OMS initiated a new service to provide information on the automation capabilities and expenditures of research libraries. The Office also started a new training program on analytical skills to assist library managers in improving problem-solving and research skills.

In another area, the OMS designed a series of organizational projections intended to portray distinct options for long-term development of research libraries (see Appendix A, last citation). These projections first were used to anticipate future staffing issues at an ARL membership meeting. During 1985, they have been used by several member libraries to develop strategic plans and organizational development programs. For example, the Yale University Libraries asked the OMS to use these projections to focus discussions among senior managers in a Leadership Development Program. Such new resources and services fit into an evolving program that is constantly adapting to the needs and interests of research library managers.

The development of innovative leadership in research libraries is a long-term process requiring energy and resources. For over 15 years the OMS has worked closely with academic and research libraries to design and operate strategies for developing staff and libraries. Through consultation and assisted self-studies, libraries can strengthen organizational structures and plan for change. Through management and analytical skills training, libraries can improve the performance of managers and staff. And through an information clearinghouse, libraries can share materials and ideas related to operational concerns and practices.

This report reviews the last year's efforts in these areas, noting resources available as well as achievements recorded. In addition, the report briefly notes prospective OMS programs that are being developed with the advice of the ARL Committee on Management of Research Library Resources. Current topics receiving emphasis in OMS programs include: strategic planning, participative management, interpersonal skills, analytical skills, executive decision-making, organizational development, and team building. During 1986, the search for financial support in designing a technical services self-study will continue. In addition, the OMS will continue to investigate the structure of research libraries, especially with regard to the way jobs are designed and the nature of reporting relationships.

The Bennis and Nanus book on leadership noted earlier observes that, "Managers are people who do things right and leaders are people who do the right thing." The difference is not in mastery of techniques or abundance of practical experience. Rather the difference is related to vision and judgement. The success of the OMS efforts can only be a function of the extent to which the emerging leaders of research libraries demonstrate the ability to create and communicate such vision. These emerging leaders must display the judgement required to concentrate limited resources to meet the changing needs of their institutions.

— Duane E. Webster

Highlights of OMS Activities in 1985

Level of activity. OMS staff conducted 22 self-studies and 38 training events, working directly in 36 member libraries. Over 2,000 individuals participated in Office activities. Sales of services and resources generated $300,000 in revenue.

Academic Library Program. Five libraries worked with Collection Analysis Projects, two with Public Services Studies, two with the Planning Program for Small Academic Libraries, and one with the Preservation Planning Program. One library was active in the Academic Library Development Program and one in the Organizational Screening Program.

Preservation. In addition, ten ARL libraries conducted preservation self-studies sponsored under the two-year, $65,375 grant awarded in 1984 by the National Endowment for the Humanities. The Office received final reports of two self-studies.

Collections Inventory. The Andrew W. Mellon Foundation awarded $220,000 to ARL to develop an online inventory of research library collections. OMS staff are managing this North American Collections Inventory Project.

Research Libraries Institute. With a Council on Library Resources grant of $45,857, the OMS planned a second Institute on Research Libraries for Library Science Faculty, to be held in 1986.

Analytical Skills. Staff developed and presented a new OMS training event, the Analytical Skills Institute, which participants at two pilot locations—the University of Pittsburgh and the University of San Diego—rated highly successful.

Training. Activities included seven Basic Management Skills Institutes, two Advanced Institutes, two Analytical Skills Institutes and an Institute for Library Directors. Staff also conducted 26 special focus workshops and other events. Over 1,100 library staff members participated in OMS training events during 1985.

The Automation Inventory. The Systems and Procedures Exchange Center published *The Automation Inventory of Research Libraries* and provided searches of the Inventory database.

Publications and Information. The Center issued two Occasional Papers and one manual; published ten SPEC Kits and Flyers; maintained 400 subscriptions; and distributed over 3,500 publications. Staff answered 1,300 requests for information.

ARL Committees. OMS staff supported the work of five ARL committees and conducted a program element on the Public Services Study for the spring ARL membership meeting.

OMS Finances. Total OMS expenditures for 1985 were $451,506. Support included the ARL dues subsidy ($115,500), revenue from use of services and resources ($316,153), and project support from foundations.

The Academic Library Program – Background

In consecutive use for over 12 years, this program provides libraries with tested methods for systematically studying library operations and developing workable recommendations and action plans for improvement. Libraries employ an assisted self-study approach, which involves staff members and administrators in gathering and analyzing information and making recommendations for changes. The OMS provides onsite consultation services, staff training, manuals, and other support materials. Self-studies normally require between three months and one year to complete, depending upon the choice of modules.

Current programs include:

The Organizational Screening Program, an intensive short-term activity to address a single issue or need; for example, reorganization, team-building, planning.

The Collection Analysis Project (CAP), a framework for assessing collection development practices and policies. Both large research libraries and academic libraries can use CAP, which includes modules on:

- Collection history and description
- Collection objectives and policies
- Material fund allocations
- Organization and staffing
- Collection assessment
- Preservation
- Resource sharing

The Preservation Planning Program (PPP) identifies current preservation activities, determines priorities, and assesses the potential impact of national developments on local programs. A manual and a resource notebook are available as a separate package. The program includes investigations of:

- Environmental conditions
- The condition of collections
- The organization and operation of preservation functions
- Disaster management
- Present and potential preservation resources

The Public Services Study (PSS): short- and long-term strategic planning in the context of emerging technologies and changing user needs. Components include:

- Describing and inventorying services
- Assessing user needs and services performance
- Examining organization, staffing, and management of services
- Planning for and using new technology
- Developing facilities requirements
- Articulating a public services program

The Management Review and Analysis Program (MRAP): a systematic examination of management functions. For libraries with 50 or more staff members, MRAP examines planning, budgeting, policy making, supervision and leadership, management information, organization, personnel practices, staff development, and executive leadership.

The Academic Library Development Program (ALDP), for libraries with staffs of more than 20 and fewer than 50. ALDP provides a method for comprehensive assessment of all aspects of mid-sized library programs: operations, services, management practices, facilities, and changing technological needs.

The Planning Program for Small Academic Libraries (PPSAL), for libraries with staffs smaller than 20. This program enables small libraries to develop plans to participate fully in instructional and research programs through examining policies, library users, delivery of services, and management.

Consultants for ALP self-studies consist of OMS staff and a pool of graduates of the OMS Consultant Training Program.

The Academic Library Program Self-Studies, 1985

During 1985, staff members at 22 libraries worked on self-studies within the Academic Library Program. Thirteen new studies began during the year and seven libraries finished their work (Table 1). The most frequently conducted studies were Preservation Planning, Collection Analysis, and Public Services.

Five libraries worked with the Collection Analysis Project, the most frequently used OMS self-study. New projects began at Oregon State University and Rutgers University, and the University of Wyoming completed its study.

In the area of public services, the subject of intensive OMS activity over the past few years, the Office completed the self-study manual, *Public Services in Research Libraries*, which is available only to self-study participants. Boston University, Colorado State University, University of California-Irvine, and University of California-Santa Barbara are conducting Public Services Studies. As the General Electric Public Services in Research Libraries Project ended early in the year, the OMS prepared a report on the two and one-half years' work, and staff conducted a public services program for the ARL membership at the May meeting.

The National Library of Medicine (NLM) finished a preservation study during the year, with the report, *Preservation of the Biomedical Literature*, completed as part of its Library Operations strategic plan for 1984-88. With the help of over 30 staff members, a senior Preservation Planning Team surveyed the status of NLM collections and reviewed available options. They recommended linking preservation more explicitly to collection development guidelines, establishing a new preservation unit, expanding preservation activity and research, improving physical conditions, encouraging publication in archival formats, initiating and participating in cooperative programs, and periodic re-evaluation of preservation efforts.

One library worked with the Organizational Screening Program. Several institutions began or continued work with the Planning Program for Small Academic Libraries and the Academic Library Development Program.

Table 1
Academic Library Program Self-Studies
1985

Institution	Type of Project	Status
Boston University	Public Services	Ongoing
Butler University	Small Library Planning	Completed
Center for Research Libraries	Preservation Planning**	Started
Colorado State University	Preservation Planning**	Completed*
Cornell University School of Hotel Administration	Organizational Screening	Completed
Georgetown Law Library	Collection Analysis	Completed
Iowa State University	Preservation Planning**	Started
National Library of Medicine	Preservation Planning	Completed*
New Mexico State University	Academic Library Development	Completed
Northwestern University	Preservation Planning**	Started
Ohio State University	Preservation Planning**	Started
Oregon State University	Collection Analysis	Started
Rutgers University	Collection Analysis	Started
Smithsonian Institution	Preservation Planning**	Started
SUNY, Stony Brook	Preservation Planning**	Completed*
Transylvania College	Small Library Planning	Completed
University of Alberta	Collection Analysis	Ongoing
UC-Santa Barbara	Public Services	Ongoing
University of Missouri	Preservation Planning**	Started
University of Oregon	Preservation Planning**	Started
University of Tennessee	Preservation Planning**	Started
University of Wyoming	Collection Analysis	Completed

*Report available from OMS
**NEH Preservation Planning Grant Award

The Systems and Procedures Exchange Center — Background

SPEC enables academic, research, special, and public libraries to share information related to their management and operations. With the overall goals of identifying expertise and encouraging its exchange, promoting experimentation and innovation, improving performance, and facilitating the introduction of change in library organizations, the Center operates several programs:

- Collecting timely information and documents on current practices in library management and operations;
- Providing compilations of library documents and brief management reports and analyses to the library community;
- Publishing analytical reviews and papers on operations and management topics;
- Conducting on-demand survey and investigative services based on individual libraries' needs.

Resources come mainly from Association of Research Libraries institutions. Several times each year, the Center conducts surveys which request information and documents on topics of current interest. These documents include manuals, policy statements, planning materials, committee reports, brochures, forms, and other published items currently used by libraries. While all documents are kept in the SPEC files, representative materials are presented in SPEC kits, issued 10 times each year.

Usually numbering about 100 pages, SPEC Kits are collections of selected documents that represent current practices at ARL libraries. Each Kit concentrates on a specific topic and includes a two-page SPEC Flyer — a management-focused overview that analyzes trends. Documents are selected for the usefulness in academic, special, and public libraries. Often, results of SPEC surveys are presented in detail.

SPEC Kits, 1985

Local Cataloging Policies, #110, January, 1985.
Addresses minimal level cataloging, copy editing, authority work, and retrospective conversion.

Cooperative Collection Development, #111, February, 1985.
Documents illustrate standardized approaches to collection description, effective use of technologies, and governance structures.

Automation and Reorganization of Technical and Public Services, #112, March, 1985.
Includes survey results, program descriptions, organization charts, recommendations and job descriptions.

Preservation Education, #113, April, 1985.
Training materials for staff programs, policy statements, examples of reader education documents, descriptions of exhibits, and information for donors.

Binding Operations, #114, May, 1985.
Use of commercial binders and developing in-house expertise are addressed, with documents on contracts, specifications, binding treatments, automated systems, and a list of selected readings.

Photocopy Services, #115, June, 1985.
Improving services and reducing theft and mutilation are described through survey results; policy, service, advertising and price statements; user survey and cost analysis forms; and vendor contracts.

Organizing for Preservation, #116, July-August, 1985.
Provides results of a telephone survey of libraries that have or are planning preservation departments and includes planning documents, organization charts, and job descriptions.

The Gifts and Exchange Function, #117, September, 1985.
Documents and survey results address the cost-effectiveness of the gifts and exchange functions, the use of automation, changes in priorities, and the impact of the Tax Reform Act of 1984.

Unionization, #118, October, 1985.
With an increasing number of unionized libraries, this kit addresses issues in unionization, contract negotiation, and changes in management practices.

Catalog Maintenance Online, #119, November-December, 1985.
Survey responses, examples of catalog maintenance procedures, job descriptions and organization charts highlight the advantanges and problems of online input.

10

Information Exchange and Publications Program, 1985

During 1985, the Systems and Procedures Exchange Center (SPEC) produced ten SPEC Kits and Flyers, and maintained over 400 subscriptions. In addition, more than 3,500 publications were distributed, and the Center provided answers to over 1,100 information requests.(Table 2) Librarians working with OMS staff in the Collaborative Research/Writing program compiled nine of the ten kits, and SPEC published two Occasional Papers: Mary J. Cronin's *Performance Measures for Public Services in Academic and Research Libraries*, and Clifford Haka and Nancy Stevens' *Guidebook for Shelf Inventory Procedures. Measuring the Book Circulation Use of a Small Academic Library Collection: A Manual*, by Mary K. Trochim, also was issued.

Publications and surveys reflect several ARL library concerns. Two kits address preservation needs and actvities, including results of surveys on preservation education and preservation organization. Continuing interest in the performance of basic library services and operations led to the Occasional Paper on shelf inventory procedures and Kits on binding, photocopy services, and gifts and exchanges, and a survey on bibliographic instruction. On-demand surveys on travel funds, security and library closing procedures, and online bibliographic search services gathered information on current trends in specific operations. In addition, responses to a Quick-SPEC survey on exhibits will appear in a 1986 SPEC Kit. The Office addressed personnel concerns with a kit on unionization and the Occasional Paper on performance measurement.

Opportunities and demands of technology were a SPEC priority. Kits covered automation as a factor in library organization, the maintenance of online catalogs, and also the automation-related topics of local cataloging policies and cooperative collection development. The collection development kit includes information from the North American Collections Inventory Project managed by the OMS. SPEC also conducted an on-demand survey for information on software acquisition and circulation policies, to be issued as a Kit in 1986.

Altogether 16 surveys were completed: six all-member or targeted surveys, eight on-demand surveys, and two Quick-SPEC surveys (Table 3). Ten librarians from ARL member institutions worked with the OMS to produce Kits and Flyers.

The number of topical document files available for loan to ARL members has increased to eight. Obtained in response to on-demand surveys and other inquiries, the files provide materials on a range of library practices. The following files are available: endowment funds; online bibliographic search services; closing procedures and security staff; Requests for Proposals for integrated library systems; collection development organization; videotape collection policies; and travel funding. There is also a file of guides to microform collections, contributed by the ARL Microform Project.

SPEC is cooperating with the American Library Association's Resources and Technical Services Division to produce a column titled "Library Practices" for the Division's *RTSD Newsletter*. During 1985, articles on the Automation Inventory of Research Libraries and the North American Collections Inventory Project were written by OMS staff. B. J. Busch, University of Alberta, served as guest editor for a column on automation and the integration of public and technical services functions.

Automation Inventory

In 1984, SPEC developed an experimental inventory on the status of automation in ARL libraries, consisting of a machine-readable database and a printed listing. After testing, the inventory was redesigned in January 1985, adding a section on expenditures at the request of the ARL Statistics Committee and with the aid of a small grant from the Council on Library Resources. In March 1985, the revised questionnaire was sent to ARL libraries, and 92 provided information. Published in August, *The Automation Inventory of Research Libraries* also is available online. Since the database is updated frequently, more current or detailed information may be available than the printed publication provides. Searches may be requested through SPEC.

The inventory assists planning and decision making by individual institutions and also provides aggregate statistics and an overview of national trends. Librarians can use it to seek comparative information, analyze trends, obtain background material, or locate institutions with specific hardware and software configurations. On a broader scale, the Inventory can be helpful in discussing research library uses of technology with university adminstrators, scholars, and the commercial sector.

Electronic Mail

SPEC Kit #106, Electronic Mail (July-August 1984) contained an all-ARL directory of EM services and listing of mailboxes at member institutions. The directory was revised in May 1985 and again in November to include new listings, and indexes by name of library and mail service. SPEC continues to experiment with E-mail, using it for communications with individual libraries, with advisory committees, with ALA, and for SPEC surveys. ALANET, ALA's electronic mail service, is being used to contact ARL members as a group.

Table 2
Systems and Procedures Exchange Center Activities
1985

Quarter	SPEC File Requests	Publication Information Requests	Kits Sold (Non-subscription)	Other Publications Sold	Subscriptions*
January-March	47	225	458	299	415
April-June	37	277	649	596	434
July-September	51	251	455	275	420
October-December	52	358	450	402	375
Total	187	1,111	2,012	1,572	411

*The figure for subscriptions maintained is a quarter average; the total is the yearly average.

Table 3
Systems and Procedures Exchange Center Surveys 1985

SPEC surveys are of three types: (1) Full member surveys that involve polling the entire ARL membership and require 2-3 months; (2) Targeted surveys that contact only selected libraries and normally produce results within a month; and (3) Quick-SPEC surveys, begun in 1984, which consist of short, brief-answer questionnaires designed to provide a quick response. Results of Quick-SPEC are available within a few weeks.

Topic	Survey Type	Number of Responses	Results
Preservation Education	Targeted	23	Kit #113
Organizing for Preservation	Targeted	27	Kit #116
Binding Operations	Quick-SPEC	26	Kit #114
Automation and Reorganization of Technical and Public Services	All members	82	Kit #112
Photocopy Services	All members	79	Kit #115
Gifts and Exchange Function	Quick-SPEC	63	Kit #117
Unionization	All members	95	Kit #118
Catalog Maintenance Online	Targeted	23	Kit #119
Endowment Funding	On-Demand Targeted	18	Document File
Online Bibliographic Search Services	On-Demand Targeted	16	Document File Compilation of results
Closing Procedures and Security Staff	Quick-SPEC	111	Document File Tabulations Individual responses Database searches
Collection Development Organization	On-Demand Targeted	30	Document File
Travel Funding	On-Demand Targeted	9	Document File
Exhibits	Quick-SPEC	70	SPEC Kit for 1986
Endowments	On-Demand Targeted	18	Document File
Microcomputer software policies	On-Demand All Member	75	SPEC Kit for 1986
Bibliographic Instruction	Targeted	25	SPEC Kit for 1986
Videotape Collections	Quick-SPEC	84	Document File
Campus Information Policy	Targeted	26	Occasional Paper for 1986

Training and Staff Development Program – Background

The OMS is committed to staff training and management development as a long-term investment for the individual, for the organization, and for the profession as a whole. Since 1973, over 6,000 persons have participated in OMS institutes, workshops and Academic Library Program studies. At institutes and workshops, the focus is on the individual: experienced librarians work with participants to help them apply concepts to the requirements of their own jobs and organizations. Training programs are keyed to varying levels of knowledge and expertise, and address areas of staff competence that are critical to dealing with the issues facing libraries today: human relations skills; analytical abilities; and content knowledge relating to collection analysis, preservation, and public services.

Analytical Skills Institutes provide development opportunities for library professionals seeking proficiency in problem-solving and project planning. The institutes are designed to strengthen the skills needed to effectively gather and analyze data, which can lead to action for substantive change in library organizations and operations. Such skills are necessary for sound decision-making and planning and essential to making a case for financial support, demonstrating accountability, evaluating operations, understanding user needs, or measuring user satisfaction. Precourse preparation and field studies are additional features of this three and one-half day event.

Basic Management Skills Institutes focus on the individual and the individual's relationship to the library organization and to others in that organization: subordinates, peers, and upper management. Participants have an oportunity to reflect on their current approach to managerial and supervisory responsibilities and to become acquainted with or review concepts and techniques associated with effective management. The goal is to broaden the new or less experienced manager's ability to function in his or her role and to contribute to the organization as a whole. The three and one-half day institutes are designed for library professionals with beginning or middle management or supervisory responsibilities.

Advanced Management Skills Institutes examine the processes that take place within library organizations and focus on the individual's ability to have a positive influence on overall organization performance. Through simulation, participants observe the effects of interventions on the system as a whole. The program also emphasizes skill-building and proficiency in observing, diagnosing, developing strategy, and action planning for solving problems and capitalizing on opportunities. The five and one-half day sessions are intended for those who hold senior management positions or who have attended previous institutes or the equivalent.

Special Focus Workshops are one to two-day institutionally sponsored programs covering a single topic or two closely related topics. They are useful for organizations faced with new situations affecting a large proportion of the staff and when a clear understanding of organizational goals is required. OMS staff develop the workshops based on the needs of individual institutions, providing a balance of conceptual models and working techniques and including self-assessment tools and case studies to relate concepts to the library environment. Sample topics include supervisory skills, motivation and leadership, strategic planning, communication, team building and group decision making, conflict resolution, performance appraisal, program evaluation, and problem solving. The sponsor is responsible for guaranteeing a minimum number of participants, and defining the needs of the group to OMS staff.

Staff for institutes and workshops consist of OMS staff members and a pool of graduates from the Consultant Training Program.

For more information on institutes, workshops and training programs, call OMS.

14

Organizational Training and Staff Development, 1985

More than 350 people attended seven basic Management Skills Institutes (MSI), two Advanced Institutes, two Analytical Skills Institutes, and one Institute for Library Directors during 1985. The Institute for Directors was the second one, following up on the initial presentation of this event in 1984. In addition to the two regularly scheduled MSIs, five institutions sponsored institutes for their own staff (Table 4).

In 1985, with a full complement of staff and consultant trainees available, the OMS conducted a total of 38 training events, reaching over 1,100 academic library staff. In addition to the public and sponsored events, staff presented 26 Special Focus Workshops and other training events. Continuing high demand for these specialized presentations indicates libraries' rapidly changing needs and increasing demands for staff versatility. Eight workshops dealt with planning or analytical topics such as performance measurement, project planning, and managing change. Staff developed six workshops which focused on collections, in connection with the Collection Analysis Project and the North American Collections Inventory Project. The others ranged widely, covering topics such as conflict resolution, technology, productivity, and supervision (Table 5).

Other staff activities included assisting the ARL Executive staff in preparing a job analysis and classification structure, and continued work with the ARL Task Force on Staffing.

New Analytical Skills Institute

As library organizations grow in complexity and as competition for resources more intense, library managers are searching for ways to analyze organizational problems more systematically. Dealing with a constantly changing environment requires more than a reactive process; it involves continual information gathering and planning. Questions arise as to what information is most useful and how it should be obtained and arrayed. Selecting and using information most effectively requires an ability to employ analytical techniques and problem-solving skills. Such skills are essential, for example, to making a case for financial support, conveying new conceptions of the library's role in the university, demonstrating account ability, improving performance, understanding user needs, or measuring user satisfaction. Yet staff members often are not acquainted with specific analytical methods applicable to library needs. While problem solving is an everyday activity, experience alone does not build skills.

To meet this need, in 1985 the OMS began a new training activity: the Analytical Skills Institute. The workshop focuses on the process and the tools needed to study library operations and chart improvements. It is intended to help library managers acquire an understanding of the conceptual underpinnings of analysis, decision making, and organizational change; improve their ability to formulate questions; and acquaint them with analytic techniques which can be effective in library settings. Participants work in groups to study actual library situations and issues, formulate strategies, and plan responses.

Two institutes were conducted in 1985 as pilot, experimental projects. The first was held in June at the University of Pittsburgh, attended by 31 library staff. Ninety-three percent of the participants rated the institute as 7 or higher based on a scale ranging from 1 (large irrelevant to my work) to 10 (highly useful to my work). A second institute in December, held at the University of California-San Diego, drew 36 library staff, 81 percent of which rated the institute as "highly useful." The success of the pilot institute has resulted in scheduling two additional public institutes for 1986.

Table 4
Management Skills Institutes, 1985

Location/Sponsor	Type of Institute	Number of Participants
Public Institutes		
Berkeley, California	Advanced	22
Boston, Massachusetts	Advanced	26
Denver, Colorado	Basic	39
Philadelphia, Pennsylvania	Basic	45
Pittsburgh, Pennsylvania	Analytical Skills	31
San Diego, California	Analytical Skills	36
Washington, D.C.	Library Directors	14
Sponsored Institutes		
Case Western Reserve University	Basic	32
Cornell University	Basic	20
University of Florida	Basic	32
University of Florida	Basic	36
University of Houston	Basic	20
Total	12 Events	353

Table 5
Special Focus Institutes, Workshops, and Presentations, 1985

Sponsor	Topic	Number of Participants
American Theological Library Association	Communication	23
American University	Technology in Academic Libraries	25
Boston	North American Collections Inventory Project (NCIP)	16
Bucknell University	Performance Appraisal	24
Bucknell University	Planning and Communication	12
Canadian Association of Research Libraries	NCIP, Calgary	22
Canadian Association of Research Libraries	NCIP for Eastern Libraries (Toronto)	24
Georgetown Law Library	Conflict Resolution	16
Indiana State University	RLG Collections Conspectus	12
International Federation of Library Associations and Institutions	World Conference on Continuing Education for Library and Information Science	50
Library of Congress	Self-Study and Improving Productivity	100
Louisiana State University	Performance Appraisal	25
Mankato State University	Collection Description	15
Meyer Trust	Cooperative Collection Management	30
National Library of Medicine	Project Planning	28
Nordic Research Council	Summer School on Academic and Research Libraries	18
North Carolina State University	Performance Appraisal	32
North Carolina State University	Planning Project Review	30
Pittsburgh Council for Higher Education	Strategic Planning and Team Building	27
SOLINET	Supervisory Skills for Technical Staff	12
Southern Illinois University	Managing Change	50
University of Chicago	Introduction to NCIP	15
University of Chicago	NCIP Instruction	60
University of Florida	Performance Appraisal	19
University of Georgia	CLR Internship Program	8
University of Maryland Alumni Association	Library Supervision	80
Total	26 Events	773

Preservation Planning Studies

Ten preservation studies continued under the two-year grant received in 1984 from the National Endowment for the Humanities. Libraries chosen to receive stipends under the grant began work in late 1984 or during 1985, and two—Colorado State University and SUNY-Stony Brook—completed their projects. Six other participants have provided interim reports on their activities. OMS staff, with the help of six consultant trainees, are assisting the studies.

At Colorado State, the administrative structure for preservation activities was the major concern. The project report recommends transfer of the existing preservation unit to the collection services department. Other recommendations deal with the physical deterioration of the collections, environmental conditions within the libraries, preservation education and disaster preparedness. SUNY-Stony Brook's report keys on preservation decision-making, physical treatment of materials, staff and user education, and organization. Recommendations include creation of a preservation department headed by a preservation librarian.

Collaborative Research/Writing Program

This program enables librarians to conduct research and prepare publications on specific, library-related issues. The OMS works with participants, offering training in survey design, data gathering and analysis and writing. Interest in the program, as measured by the number of participants, has grown steadily over the past several years. Most of the projects result in the production of a SPEC Kit or Occasional Papers (Table 6).

During 1985, program authors compiled nine Kits and completed two Occasional Papers. *Performance Measurement for Public Services in Academic and Research Libraries*, by Mary J. Cronin, addresses a timely and controversial topic: the use of objective indicators to help improve library staff outputs. Cronin analyzes performance measurement from three perspectives—first, in the context of evaluation theory. Second, building on the theory, she provides a model for applying performance measurement to library activities. Finally, she discusses arguments for and against measurement, and future trends. A bibliography is included.

Clifford Haka and Nancy Steven wrote *Guidebook for Shelf Inventory Procedures in Academic Libraries* because they found that automated access makes it increasingly difficult to maintain reasonable correspondence between entries in the catalog and materials on the shelves. Often, inventory projects seem too large to undertake, but the guidebook can help librarians identify the benefits, and determine costs. Its major use is as a workbook, since it contains specific procedures, flowcharts, and diagrams. There are also results from a survey of ARL institutions. The paper expands on a research note published in *College and Research Libraries* (March 1985).

Measuring Book Use

Measuring the Book Circulation Use of a Small Academic Library Collection is a 73-page manual including extensive instructions; procedures; background information; and tear-out worksheets and guides. The latter consist of data collection and log sheets and a 20-page data collection and analysis guide. There are descriptions of study applications for locating materials, weeding, reference staffing, budget allocations, review of purchased materials, reclassification, and installation of electronic security systems. The aim is to enable library staff to carry out a circulation study without outside assistance, interpret the results, and convert findings into productive changes in the library's collection management process. The methodology was developed over a three-year period with some funding assistance from the Council on Library Resources. The Associated Colleges of the Midwest published an earlier version of the manual.

Institute on Research Libraries for Library School Faculty

Work on a second Institute on Research Libraries for Library School Faculty to be held in 1986 was begun during 1985. The Office planned for the event, establishing a Boston area location, and conducted a nationwide competition for participants. Boston Public Library, Boston University, Harvard University, and the Massachusetts Institute of Technology are serving as hosts for the Institute. The OMS conducted a similar event in 1984 in Chapel Hill, North Carolina, attended by 12 library educators. The Institutes are

Table 6
Collaborative Research/Writing Program Participants and Topics
1985

Bibliographic instruction:
Carol Ahmad, Assistant Director for Public Services, University of Miami Library

Local cataloging policies:
Alice Allen, Head, Cataloging Department, University of Oregon Library

Automation and reorganization of technical and public services:
B. J. Busch, Area Coordinator, Humanities and Social Sciences Library, University of Alberta

Public services performance measures:
Mary J. Cronin, Director, Cudahy Memorial Library, Loyola University of Chicago

Role of the library in campus information policy:
Kenneth E. Flower, Administrative Office, Milton S. Eisenhower Library, Johns Hopkins University

Organizing for preservation:
Irene P. Godden, Assistant Director for Technical Services, Colorado State University Libraries

Shelf inventory procedures:
Clifford Haka, Information Librarian, Michigan State University Libraries

Integrated library systems:
Arnold Hirshorn, Associate Director for Technical Services, University Library, Virginia Commonwealth University

Technical services cost studies:
Heidi Lee Hoerman, Assistant Director of Technical Services, Montana State University Library

Binding operations:
Don Lanier, Head, Acquisitions and Serials Department, Founders Library, Northern Illinois University

Unionization:
Frederick C. Lynden, Assistant University Librarian for Technical Services, Brown University Library

Catalog maintenance online:
Gillian M. McCombs, Head, Catalog, Authority Files, and Shelflist Maintenance Department, University Libraries, State University of New York, Albany

Photocopy services:
Donna L. McCool, Assistant Director for Administrative Services, Washington State University Libraries

The gifts and exchange function:
Julieann V. Nilson, Head, Acquisitions Department, Indiana University Libraries

Preservation education:
Jan Merrill-Oldham, Head, Preservation Department, Homer Babbidge Library, University of Connecticut

End users:
Sarah Thomas, Chief, Technical Services Department, National Agricultural Library

Exhibits:
Mary Wyly, Director of Library Services, The Newberry Library

intended to facilitate communication between the research library community and library education, and to help faculty explore the changes taking place in research libraries. The Council on Library Resources is helping to support this project with a $45,857 grant.

North American Collections Inventory Project

Since 1983, the Office has worked with the Research Libraries Group to convert its Collection Conspectus program into an inventory of North American Research Collections. During the first two phases of the program, OMS staff developed procedures and resources to support use of the Conspectus and tested them in three ARL member libraries. Conspectus work is reflected in the construction of a data base that provides information on the location of specific subject collections, their relative strengths, and coverages. Managed by RLG, the data base is available in both on-line and print formats.

In June 1985, the Andrew W. Mellon Foundation awarded a grant of $220,000 to ARL to support the full-scale implementation of the North American Collections Inventory Project (NCIP). The three-year grant supports the selection and preparation of 15 librarians as NCIP trainers; the development of a materials distibution center; and the support system needed to coordinate ARL member participation. In addition, OMS project staff will prepare educational materials for librarians and research library users and develop procedures for identifying specialized collections in libraries outside the ARL membership. The project also includes investigating and promoting uses of NCIP data for cooperative programs. At the end of the grant period, the online inventory of North American research library collections is expected to include data from nearly 100 ARL libraries. It will serve as the foundation for inter-institutional cooperation in acquiring, preserving, and providing access to research materials.

Jeffrey Gardner, OMS Associate, and Jutta Reed-Scott, Collection Development Specialist, are managing the project. They are working with NCIP consultants to initiate and monitor libraries' Conspectus projects; maintain the flow of information regarding changes and additions to the Conspectus and Conspectus-related tools; coordinate efforts to identify specialized research collections in non-ARL libraries; and develop additional materials to facilitate participation in NCIP. Activities are undertaken in close cooperation with RLG staff and with the assistance of an advisory committee that includes library directors, collection development librarians and RLG personnel.

NCIP Training

Following a nationwide application process, the advisory committee selected 15 participants for the NCIP Trainers workshop, held in Boston in November 1985 (Table 7). The training sessions included collection evaluation techniques, Conspectus requirements, and skills for designing and operating workshops. The trainers are now available to assist research libraries in planning and organizing Conspectus projects and to instruct staff in the methods for completing the Conspectus.

Canadian Collection Inventories Plan

The Resource Network Committee of the National Library of Canada's Advisory Board has developed a National Plan for Collections Inventories, to include both general and special collections. In connection with the general collection inventories, the Canadian Association of Research Libraries (CARL) is applying the Conspectus to develop a Canadian Inventory that will include data from non-CARL academic libraries, large public libraries, and special libraries. Of the 29 CARL members, 14 belong to ARL as well and will participate in NCIP. Conspectus data will reside in a Canadian database modelled on the RLG Conspectus On-line. The prototype is expected to be available in April 1986.

The OMS has adapted Conspectus materials for Canadian applications. OMS staff designed and operated NCIP training workshops for CARL libraries staff in western and central Canada in October 1985, with two more workshops planned for 1986.

OMS NCIP Materials

The Office is making available a variety of materials to assist libraries in applying the Conspectus. Worksheets are available for all divisions of the Library of Congress Classification except A, U, and V. Worksheets for Anthropology (GN) and Bibliography and

Library Science (Z) are under final review, and worksheets for Women's Studies and African Studies are in progress. Supplementary guidelines for some Conspectus divisions are available, and verification studies (comparative collection analyses) also can be requested from OMS.

Table 7
North American Collections Inventory Project Consultants

Ross Atkinson
Assistant University Librarian for Collection Development, University of Iowa Libraries

Stella Bentley
Planning and Budget Officer, Indiana University Libraries

Joanne Euster
Director of Libraries, San Francisco State University

Anthony W. Ferguson
Collection Development, Texas A&M University

Charles S. Fineman
Humanities Bibliographer, Northwestern University Library

Pierre Gaudette
Adjoint au Directeur, Planification des Collection, Universite de Sherbrooke

Lelde B. Gilman
Head, Collection Development, Biomedical Library, University of California, Los Angeles

Joan Grant
Director of Collection Management and Consortial Services, New York University Library

Deborah L. Jakubs
General Bibliographer, Collection Development, Perkins Library, Duke University

Leslie LaFleur
University of Alberta Library

Annette Melville
Collections Development Office, Library of Congress

Marcia J. Pankake
Bibliographer, English and American Literature, Wilson Library, University of Minnesota

Anna H. Perrault
Humanities Bibliographer, Middleton Library, Louisiana State University

Assunta Pisani
Administrative Head, Collection Development Department, Harvard College Library

Joel S. Rutstein
Assistant Director for Collection Services, Colorado State University Libraries

Mary Jane Starr
Special Assistant to the Associate National Librarian, National Library of Canada

OMS Priorities for 1986

Office staff, in collaboration with the ARL Committee on Management of Research Libraries, prepare a detailed statement of priorities each year, which is used for planning and performance review. The following are highlights from that document.

Academic Library Program

The OMS expects to begin up to 10 new library studies in the areas of collection analysis, preservation planning, and public services, with OMS staff sharing the workload with consultant trainees. These three areas are expected to attract most member interest and participation. The remaining participants in the NEH-sponsored Preservation Planning Program studies will finish their work in 1986.

Information Exchange and Publications Program

The information clearinghouse continues to build member services such as specialized on-demand surveys and databases, and to expand use of electronic mail to facilitate communications between members and the Office. The Center will publish ten SPEC Kits and Flyers and conduct five to ten on-demand surveys, working with collaborative research/writers from ARL member libraries to produce many of the Kits plus several additional publications. Kit topics for 1986 include: technical services cost studies; policies for microcomputer software acquisition and circulation; barcoding library collections for automated systems; exhibits in libraries; role of the library in serving the end user; bibliographic instruction; interlibrary loan services; integrated and interfaced library systems; retrospective conversion; and disk technologies: laser, optical, compact, video.

Staff expect no more than three all-member surveys, and three targeted surveys. The document circulation and file search services will operate at an anticipated level of 15 requests per month, and updated editions of the *SPEC Index* and the *Electronic Mail Directory* will be published.

The Office plans to develop two or three experimental databases as part of information services for members. The Automation Inventory database probably will cover more than 100 libraries when 1986 data is collected and made available. With the additional information available, search services for the database will be expanded.

Organizational Training and Staff Development

The OMS will conduct six major public institutes and an equal number of sponsored training events, and explore ideas for several new training programs, including a management institute for associate/assistant directors/university librarians. Public Institutes will include two basic and two advanced Management Skills Institutes, two Analytical Skills Institutes, and a Management Institute for ARL Directors. Staff and consultant trainees will conduct up to eight additional Management Skills Institutes on a sponsored basis, as well as a maximum of 15 Special Focus Workshops. In addition, the Office expects to revise the Basic and Advanced Management Skills Institute Notebooks.

In the training area, staff will investigate additional analytical and quantitative programs. Under consideration are programs in the budgeting and fiscal control areas as well as a review of characteristics of leaders in the library profession.

Research and Development

Research and development priorities include separately funded projects, efforts to begin new programs, and OMS assistance to research projects operated by other agencies. Major 1986 efforts include operating the North American Collections Inventory Project, conducting the Institute on Research Libraries for Library Science Faculty, completing the NEH-funded Preservation Planning Program demonstration studies, and developing a new self-study initiative in the technical services area.

In the NCIP, Phase III of the project will be operated. Activities include training participating librarians, developing assessment tools, promoting ARL member participation in NCIP, and providing educational materials for public service staff and library users. More exploration of cooperative collection development projects will take place.

The Office will conduct the second Institute on Research Libraries for Library Science Faculty July 28-August 8 in the Boston area. A number of ARL libraries will serve as sites for the 12 participants' field

visits, and four libraries in Cambridge and Boston will be helping to operate the two-week event.

With the NEH project studies nearing completion, staff will consider the next steps in obtaining support for member libraries' preservation planning. Securing funding to undertake revisions of the *Preservation Planning Program Manual* and *Preservation Resource Notebook* is one possibility.

Other Priorities

OMS staff will work closely with the ARL Committee on Management, and other ARL committees as needed, including the Collection Development, Bibliographic Control, Statistics, and Preservation Committees.

Appendix A
Staff and Program Publications
1985

The Automation Inventory of Research Libraries. Washington, D.C., OMS, August, 1985.

"Automation Inventory of Research Libraries," *RTSD Newsletter* 10 (1985): 50-1.

Colorado State University Libraries. *A Preservation Program for the Colorado State University Libraries*. December, 1985.

Cronin, Mary J. *Performance Measurement for Public Services in Academic and Research Libraries*. Occasional Paper no. 9. Washington, D.C., OMS, February, 1985

Electronic Mail Directory of ARL Members. Draft Copy for Review. Washington, D.C, OMS, October 1985.

Guide de L'inventaire des Collections des Bibliothèques de Recherche en Amérique du Nord. Rédigé par Jutta Reed Scott. Édition de janvier 1985. Traduction par la Bibliothèque Nationale du Canada, juillet 1985. Washington, D.C., OMS, 1985.

Haka, Clifford, and Nancy Stevens. *A Guidebook for Shelf Inventory Procedures in Academic Libraries*. Occasional Paper no. 10. Washington, D.C., OMS, July 1985.

Manual for the North American Inventory of Research Library Collections. Prepared by Jutta Reed-Scott. January 1985 edition. Washington, D.C., OMS, 1985.

NCIP News. No. 1, January 1986- . Washington, D.C., Office of Management Studies.

NCIP Materials

L.C.-Dewey Conversion Table

Brief Instructions for Completing Worksheets for NCIP

Complete Set of Conspectus Worksheets

Sections of the NCIP Conspectus
- Agriculture
- Art and Architecture
- Biology and Natural Sciences
- Cartographic Materials
- East Asian Studies
- Economics and Sociology
- Education
- Government Documents
- History and Auxiliary Sciences
- Latin American Studies
- Law
- Linguistics, Languages and Literature
- Medicine and Health Sciences
- Music
- Philosophy and Religion
- Physical Geography and Earth Sciences
- Physical Sciences
- Political Science
- Psychology
- South Asian Studies
- Technology

Verification Studies
- Agricultural Economics
- Art and Architecture, Renaissance/Baroque
- English Literature
- French Literature
- Mathematics
- Russian History and Literature
- Scripture Study
- Swiss History

National Library of Medicine. *Preservation of the Biomedical Literature: A Plan for the National Library of Medicine*. October, 1985.

Office of Management Studies. *Annual Report, 1984*. Washington, D.C., OMS, 1985.

Office of Management Studies. Systems and Procedures Exchange Center. *SPEC Kits and Flyers*. Washington, D.C., Office of Management Studies, 1985.

Local Cataloging Policies
#110, January
Cooperative Collection Development
#111, February
Automation and Reorganization of Technical and Public Services
#112, March
Preservation Education
#113, April
Binding Operations
#114, May
Photocopy Services
#115, June
Organizing for Preservation
#116, July-August
The Gifts and Exchange Function
#117, September
Unionization
#118, October
Catalog Maintenance
#119, November-December

"An Online Inventory of Research Library Collections," *RTSD Newsletter* 10 (1985): 96-7.

"Preservation Efforts of the ARL Office of Management Studies," *RTSD Newsletter* 10 (1985): 40-1.

Public Services in Research Libraries: An Assisted Self-Study Manual. Prepared by Duane E. Webster, Patricia K. Swanson, and the OMS Staff. Chapter on Facilities in Public Services prepared by Clifford H. Haka. Working draft, revised January 1985. Washington, D.C., OMS, c1985.

"Services: The OMS Public Services Program," p. 25-48 in Association of Research Libraries, *Minutes of the 106th Meeting*, May 16-17, 1985, Cincinnati, Ohio. Washington, ARL, 1985.

State University of New York, Stony Brook. *Preservation at Stony Brook*. July, 1985.

Subject Index to SPEC Kits, 1973-1985. Washington, D.C., OMS, April, 1985.

Trochim, Mary Kane, with Arthur Miller Jr., and William M.K. Trochim. *Measuring the Book Circulation Use of a Small Academic Library Collection: A Manual*. Washington, D.C., OMS, October 1985.

Webster, Duane E., "Remarks on Organizational Futures: Staffing Research Libraries in the 1990s," p. 3-5 in Association of Research Libraries, *Minutes of the 105th Meeting*, October 24-25, 1984, Washington, D.C. Washington, ARL, 1985.

Webster, Duane E., "Organizational Projections for Assessing Future Research Library Staffing Needs and Prospects," p. 6-26 in Association of Research Libraries, *Minutes of the 105th Meeting*, October 24-25, 1984, Washington, D.C. Washington, ARL, 1985.

Appendix B
Advisory Committees
1985

ARL Committee on the Management of Research Libraries

Joan Chambers, Chair
Director of Libraries, Colorado State University

Richard DeGennaro
University of Pennsylvania

Ellen Hoffmann
Director, York University Libraries

Herbert Johnson
Director, Emory University Library

Sul H. Lee
Dean, University Libraries, University of Oklahoma

Jay Lucker
Library Director, Massachusetts Institute of Technology

Susan K. Martin
Librarian, Johns Hopkins University

Joining the Committee in 1986:

Philip E. Leinbach
Librarian, Tulane University

Carlton C. Rochell
Dean, University Libraries, New York University

Public Services in Research Libraries Project Advisory Committee

Jay Lucker, Chair
Library Director, Massachusetts Institute of Technology

Harold Billings
Director, University of Texas Libraries

Robin Downes
Director, University of Houston

Susan K. Martin
Librarian, Johns Hopkins University

Robert Miller
Librarian, University of Notre Dame

Merrily Taylor
Librarian, Brown University

Paul Vassallo
Dean of Library Services, University of New Mexico

North American Collections Inventory Project Advisory Committee

David Farrell
Assistant University Librarian, Indiana University

Leslie Hume
Associate Director of Program Coordination, Research Libraries Group

Paul Mosher
Assistant University Librarian, Stanford University

Susan Nutter
Assistant Director of Libraries, Massaschusetts Institute of Technology

Elaine Sloan
Dean of University Libraries, Indiana University

David Stam
Director of Libraries, Syracuse University

Mary Jane Starr
Special Assistant to the Associate National Librarian, National Library of Canada

Institute on Research Libraries for Library School Faculty Advisory Committee

Irene Hoadley
Director, Texas A&M University Libraries

Edward Holley
School of Library Science, University of North Carolina

Margot McBurney
Chief Librarian, Queen's University Library

Charles McClure
School of Library Science, University of Oklahoma

Ruth Person
School of Library and Information Science, Catholic University

Ronald Powell
School of Library Science, University of Michigan

Robert Stueart
Dean, Graduate School of Library and Information Science, Simmons College

Merrily Taylor
Librarian, Brown University

Robert Vosper
University Librarian Emeritus, University of California, Los Angeles

Herbert White
Dean, School of Library and Information Science, Indiana University

Appendix C
Consultant Trainees and Project Assignments as of December 31, 1985

Between 1979 and 1983, the OMS Consultant Training Program helped 77 librarians, mostly from ARL member libraries, to acquire the skills and knowledge to assist library self-study and training programs. Four classes of trainees completed an OMS Consultation Skills Workshop and a practicum in which each worked with OMS staff members on library studies, research and publications, or training programs. Trainees also read widely in the professional literature, designed study interventions, prepared organizational assessments, and participated in related workshops, institutes, and conferences.

Currently, CTP participants are able to serve as principal or co-consultants for OMS self-studies and training events. Many use the skills they acquired primarily to benefit their home institutions, while accepting consulting assignments on an occasional basis.

This list includes the date each consultant completed the training program, their affiliations, and their OMS assignments. The following abbreviations are used:

ALDP:	Academic Library Development Program
C:	Principal consultant
CAP:	Collection Analysis Project
MRAP:	Management Review and Analysis Project
MSI:	Management Skills Institute
OS:	Organizational Screening Program
P:	Practicum
PP:	Preservation Planning Program
PPSAL:	Planning Program for Small Academic Libraries
PS:	Public Services Project
R/W:	Research/Writing asignment
T:	Training program

Noreen S. Alldredge, Director of Libraries, Montana State University (1980)
University of Illinois, Chicago Circle: CAP (P)

Arnold Bellefontaine, Executive Officer, Office of the Associate Librarian for National Programs, Library of Congress (1981)
Columbia, Md. MSI (T); University Center of Georgia Stress Workshop, (T); University of Chicago Supervisory Skills, (T); George Washington University CAP (P)

Annalea Bennett, Mill Valley, Calif. (1981)
Brandeis University: Technical Services Planning Study (P)

Bella Z. Berson, Associate Librarian, and Director, Medical Library, Yale University (1980)
Consultation Skills Workshop (T); University of California Public Services Workshop (T)

Martha Bowman, University Librarian, University of Louisville (1981)
Howard University CAP (P)

Joseph Branin, Assistant Director for Collection Development, University of Georgia (1981)
Miami University ALDP (P); Nashville Tenn., Mobile, Ala. MSI (T)

Patricia L. Bril, Collection Development Officer, California State University-Fullerton (1982)
Tucson, Ariz. MSI (T)

Joan Chambers, Director of Libraries, Colorado State University (1981)
California State University, Sacramento ALDP (P)

Keith Cottam, Director of Libraries, University of Wyoming (1980)
Ohio State University & Columbia, Md. MSI (T); University of Houston: PS (P)

Mary J. Cronin, Director of Libraries, Loyola University (1983)
Chicago, Ill. MSI (T); OMS Occasional Paper (R/W)

Howard W. Dillon, Associate Director for Public Services, University of Chicago (1980)
Ball State University: MRAP (P); North Park College: PPSAL (C)

Allan J. Dyson, University Librarian, University of California, Santa Cruz (1983)

Joanne R. Euster, Director of Libraries, San Francisco State University (1980)
OMS Occasional Paper: (R/W); North Texas State University: OS (P).

Bela Foltin, Assistant Director for Collection Development, University of Miami (1983)

Peter D. Haikalis, Assistant Director, Readers Services, San Francisco State University (1982)
University of California, Riverside: PS (P); Services University of Missouri, Columbia MSI (T)

Clifford H. Haka, Information Librarian, Michigan State University (1983)
OMS Occasional Paper (R/W).

Shirley Hallblade, Associate Director, Vanderbilt University (1982)
University of North Carolina: PS (P)

Larry Hardesty, Library Director, Eckerd College (1980)
Lake Forest College: PPSAL (P)

Carolyn Harris, Head, Preservation Department, Columbia University (1982)
Boston, Mass. MSI (T); Johns Hopkins Supervisory Skills Workshop (T); University of Missouri and University of Tennessee PP (P)

Alan E. Hagyard, Physical Science and Geology Librarian, Yale University (1983)
Boston, Mass. Advanced MSI (T)

Fred M. Heath, University Librarian, University of North Alabama (1980)
St Olaf College: PPSAL (P); Carleton College and Wittenberg College: PPSAL (C)

Ellen Hoffmann, Director of Libraries, York University (1982)
Brown University: PS (P)

Clinton Howard, Acquisitions Librarian, University of Kansas (1981)
Occasional Paper (R/W)

Willis M. Hubbard, College Librarian, Gettysburg College (1981)

Olive C. James, Consultant for Reference Services and Interim Head of the Reference Department, Yale University Library (1983)

Phyllis E. Jaynes, Director of User Services, Dartmouth College (1980)
McGill University: CAP (P)

William G. Jones, Assistant University Librarian, University of Illinois at Chicago (1980)
Hanover College: PPSAL (P); OMS Occasional Paper (R/W); Minneapolis, Minn. MSI (T); St. Joseph's College: PPSAL (C)

Gail A. Kennedy, Acting Assistant Director for Technical Services, University of Kentucky (1983)
SPEC Kit (R/W)

David F. Kohl, Assistant Director for Undergraduate Libraries, University of Illinois at Urbana-Champaign (1983)
Philadelphia, Penn. MSI (T)

Marianne Kozlowski, Programmer, MCS Company (1980)
Temple University: OS (P); Minneapolis, Minn. MSI (T); St. Xavier College: PPSAL (C)

John Kupersmith, Assistant for Public Services Programs, University of Texas at Austin (1983)

Ronald Leach, Dean of Libraries, Indiana State University (1981)
University of Michigan, Coping with Change Workshop (T); Indiana State University, Ohio State University MSI (T)

Philip E. Leinbach, University Librarian, Tulane University (1981)
York University Supervisory Skills Workshop (T)

Barbara Rice Lockett, Principal Reference Librarian, Rensselaer Polytechnic Institute (1981)
State University of New York, Stony Brook (P) and Ohio State University: PP (C)

Charles Lowry, Library Director, University of South Alabama (1980)
Transylvania College: SLPP (P)

Connie K. McCarthy, Assistant University Librarian for Collections, George Washington University (1982)
Georgetown University: CAP (P)

Patricia McClung, Associate Director for Program Coordination, Research Libraries Group (1983)
University of Oregon MSI (T); AALS Workshop (T); University of Oregon: PP (P)

Donna L. McCool, Assistant Director for Administrative Services, Washington State University (1980)
University of British Columbia: CAP (P); SPEC Kit (R/W)

David R. McDonald, Assistant Director of Systems, University Library, University of Michigan (1982)
University of Texas, Case Western Reserve University MSI (T); San Diego, Calif. Analytical Skills Institute (T)

Neosha Ann Mackey, Head of Reference, Southwest Missouri State University (1980)
Minneapolis, Minn. MSI (T)

Charles Martell, Associate University Librarian for Public Services, California State University, Sacramento (1981)
San Jose, Calif. OS (P); University of Pittsburgh MSI (T)

James R. Martin, Assistant Director for Public Services, Florida State University (1983)

Arthur Miller, College Librarian, Lake Forest College (1981)
Gannon University PPSAL (P); Alverno College, Lake Forest College PPSAL (C)

R. Bruce Miller, Head, Systems Office, Indiana University Libraries (1982)
Vanderbilt University: CAP (P); San Diego, Calif. Analytical Skills Institute (T)

Phyllis S. Mirsky, Assistant University Librarian, Sciences, University of California, San Diego (1983)
North American Collections Inventory Project (T)

Margaret Myers, Director, Office for Library Personnel Resources, American Library Association (1982)
Johns Hopkins Supervisory Skills Workshop (T)

Julie Blume Nye, Library Systems Analyst, Triangle Research Libraries Network (1983)
Duke University: CAP (P); Coral Gables, Fla. MSI (T)

Roger H. Parent, Deputy Director, Library Administration and Management Association, American Library Association (1980)
University of California Public Services Workshop (T); San Diego, Calif. MSI (T)

Paul E. Peters, Assistant University Librarian for Systems, Columbia University (1982)
Consultation Skills Workshop (T); Pittsburgh, Pa. Analytical Skills Institute, Pittsburgh, Pa. (T)

Anne Peyton, Associate Director, Capital Giving, Dartmouth College (1980)
DePaul University: PPSAL (P); New Hampshire MSI (T); Massachusetts Institute of Technology MSI (T)

Shelley Phipps, Assistant University Librarian for Branch Services, University of Arizona (1981)
University of Colorado: CAP (P); HARLIC, Houston, Texas, University of Alberta MSI (T)

Lance D. Query, Director, Library Research and Analysis, Northwestern University (1983)
Center for Research Libraries: PP (P)

Drew Racine, Acting Assistant Director for Technical Services, University of Missouri (1983)
Colorado State University: PP (P); Iowa State University: PP (C)

Ann K. Randall, Chief Librarian, City College of the City University of New York (1982)
Temple University: PS (P)

Grace M. Reed, Armco, Cincinnati, Ohio (1980)
University of Maryland: CAP (P); Theological Library Association MSI (T)

Anne Reuland, Information Services Librarian, Vanderbilt University (1983)
Columbia, MD. MSI (T)

Jeanne Richardson, Collection Development Coordinator, Arizona State University (1983)
Cornell University CAP Planning (T)

Dennis E. Robison, University Librarian, James

Madison University (1980)
Earlham College: PPSAL (P)

Karen L. Sampson, Manager-Administration, U.S. WEST Information Services, Denver, Colo. (1982)
Alberta, Canada MSI (T)

Jordan M. Scepanski, Director of Libraries, California State University, Long Beach (1980)
University of Notre Dame: CAP (P); University of Evansville: PPSAL (C)

D.W. Schneider, Associate Director of the Library, Louisiana State University (1981)
University of Houston CAP (P)

Beth J. Shapiro, Assistant Director for Readers' Services, Michigan State University (1983)

Thomas Shaughnessy, Director, University of Missouri, Columbia (1981)
University of Tulsa ALDP (P)

Kristen M. Dahlen Skivington, Department of Communcation, Michigan State University (1982)
Columbia, Md. Advanced MSI (T)

George Soete, Assistant University Librarian for Humanities and Social Sciences, University of California, San Diego (1980)
SPEC Flyer/Kit (R/W); Brigham Young University CAP (P); Huntington College, Franklin College, Goshen College: PPSAL (C); University of California, Berkeley Public Services Workshop (T); Boulder, Colo., Columbia University, Tucson, Arizona, University of Oregon MSI (T); NCIP Training, University of Southern California (C)

Patricia Swanson, Assistant Director for Science Libraries, the John Crerar Library of the University of Chicago (1981)
University of Michigan CAP (P); Performance Appraisal, Northern Illinois University (T); Consultation Skills Workshop (T); University of Arizona Planning Retreat (T); University of Pittsburgh Communication & Long Range Planning Workshop (T); University of Alberta, Tucson, Arizona MSI (T); University of Chicago Organizational Skills for Beginning Librarians (T)

John W. Tanno, Associate University Librarian for Planning and Development and Acting University Librarian, University of California, Riverside (1982)
University of Alberta: CAP (P)

Mary Trochim, Director, Ithaca Community School of Music and Arts (1981)
Dillard University, Atlanta College of Art Small College Collection Assessment (P); Tougaloo College, Tuskegee Institute Small College Collection Assessment (C); Cornell University MSI (T); OMS Occasional Paper (R/W)

Barbara von Wahlde, Director of Libraries, State University of New York, Buffalo (1983)
Northwestern University: PP (P)

David Walch, Director of the University Library, California Polytechnic State University (1981)
University of Arizona OS (P)

Patricia Wand (formerly Silvernail), Assistant University Librarian for Public Services, University of Oregon (1983)
San Diego, Calif. MSI (T)

H. Lea Wells, Library Consultant, Long Beach, Calif. (1981)
SPEC Flyer/Kit (R/W); Toronto MSI (T)

Sara Lou Whildin, Campus Head Librarian, Pennsylvania State University, Delaware County (1980)
Franklin & Marshall College CAP (P)

Patricia B. Yocum, Head, Natural Science Library, University of Michigan (1983)
Indiana, North American Collections Inventory Project (P); Mankato State University, Collection Description (T); Michigan State University Collection Description (C)

David S. Zeidberg, Head of Special Collections, University of California, Los Angeles (1982)
Catholic University of America: CAP (P); SPEC Kit #100, Collection Security (R/W)

Appendix D
OMS Financial Statement (unaudited)*
1985

SOURCES OF FUNDS		EXPENDITURES	
Publications	$114,698	Staff and Reimbursed Travel Expenses	234,117
Consultation	30,190	Administrative Expenses	211,908
MSI Training	141,781	Support to Projects	5,481
Investment Income	21,160	Total Expense	$451,506
ARL Support	115,500		
Cost Reimbursement	29,484	Surplus	$ 1,307
Total Revenue	$452,813		

*Audited statements appear annually in the Proceedings of the spring ARL meeting.

Appendix E
Schedule of OMS Services and Prices
1985-86

	ARL Libraries	Non-ARL Libraries
Academic Library Program		
Full study	$6,000 plus travel	$9,000 plus travel
Limited study	$4,000 plus travel	$6,000 plus travel
Institutional consultation	$200 per day plus travel	$300 per day plus travel
Exploratory visits	Travel only	$300 per day plus travel
Information Collection and Distribution		
SPEC Services		
Basic membership: SPEC flyer	6 free	$ 75.00
SPEC Kits (annual subscription)	$100.00	$150.00
SPEC Kits (individual copies)	$ 10.00	$ 20.00
SPEC on-demand surveys	$500.00	not eligible
SPEC file searches	$200.00	not eligible
OMS Publications		
Occasional papers	2 free	$ 15.00
Study reports	varies by size	varies by size
Training		
Management Skills Institutes		
Public/basic	$325.00 per person	$325.00 per person
Public/advanced	$490.00 per person	$490.00 per person
Institution-sponsored basic*	$250.00 per person	$275.00 per person**
Institution-sponsored advanced*	$375.00 per person	$415.00 per person**
Analytical Skills Institutes	$450.00 per person	$450.00 per person
Special Focus Workshops for Institutions	$ 50.00 per person per day plus travel***	$ 75.00 per person* per day plus travel***

*With a minimum of 20 participants
**Must include an ARL component or sponsor
***With a minimum of 12 participants